



## Finance Committee

Date: January 6, 2022

Time: 4:00 p.m.

Location: Conducted by Remote Participation

### Agenda

1. Appointment of new members and re-appointment of certain existing members to regular and at-large positions on the Finance Committee

Topic: Finance Committee Appointment Recommendations

Time: Jan 6, 2022 04:00 PM Eastern Time (US and Canada)

Join Zoom Meeting

<https://town-arlington-ma-us.zoom.us/j/89914340477>

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# Presentation to the Arlington Finance Committee Appointing Authority

December 31, 2021

Charles T. Foskett

**Updated 1/6/2022**

# Topics

- Introduction
- Proposed new member, Wanda Nascimento
- Roster Comparisons 2021 and 2022
- Precinct Term Expiration Schedule
- Appointments and Terms Requested
- Nascimento Curriculum Vitae

# Introduction

- This has been a complicated year, beset by reprecincting confusion in addition to the complications of the ongoing Covid-19 pandemic.
- We have had three resignations from the Finance Committee by long-serving, dedicated members: John Deyst (wanted to resign last year, but I prevailed upon him to stay one more year), Peter Howard and Mary Margaret Franclemont. Without violating any confidences, I think I can report that the reasons were a combination of age, health and personal issues and dealing with the “technology” of virtual meetings. We will miss them.
- Our long-term, part-time Executive Secretary, Liz Diggins, resigned to take a full-time position as Executive Secretary for the Arlington School Committee. Working with Caryn Malloy and Claire Roberts in the Arlington Human Resources Department we were able to recruit and hire Tara Bradley, an energetic, well-educated, skilled and enthusiastic professional. It is hard to replace Liz Diggins, but Tara will be great.
- We have recruited two proposed new members, Wanda Nascimento and Sophie Migliazzo, please see the following page.
- After the reprecincting issues, we still have one open precincts, Pct. 7. I am in preliminary discussions with one candidate for Precinct 7, but this will not move forward for several weeks.
- This document includes recommendations for other regular and at-large members.

# Proposed New Member: Wanda Nascimento

- I am recommending the appointment of Ms. Nascimento, who has shown an interest in the Finance Committee for more than a year.
- I interviewed her several times. She is the Chief Financial Officer of Bay State Community Services and has been a CFO and senior executive at other public service organizations. She has a B.S. in Accountancy and an MBA.
- I interviewed two references:
  - Diane McIver, a business reference (Facilities Executive), who worked with Wanda for more than three years who reports that Wanda is organized, a self-starter, highly competent, scrupulously honest, a great public speaker and a leader.
  - Susanna Jonke, a personal reference, has known her for 40 years, Wanda is god-mother to her son; reports Wanda is highly organized and reliable, easy to speak to and be with, creative, trustworthy and honest, very even-keeled, kind and not emotional.
- Wanda's resume is attached.
- I strongly recommend her and ask that the Approval Authority approve her appointment as the Finance Committee member from Precinct 18.

# Proposed New Member: Sophie Migliazzo

I am recommending the appointment of Ms. Migliazzo, who is also a Town Meeting Member from Precinct 8.

- I know her personally from Town meeting and local precinct activities. Sophie has a law degree and has practiced corporate and finance law both in Boston and Paris. She is a member of the Massachusetts Bar. She stepped back from her legal practice a few years ago to raise her children, but has been active in the Town and her children's schools.
- I have two references:
  - Katie Garrett, a lawyer and law school classmate of Sophie's who has known Sophie for 20 years. She describes her as conscientious, analytical, having a high work ethic, very discrete, and able to grasp the "big picture", even-keeled and of high integrity.
  - Eve Encinas-Loncar, a Cambridge educational executive with whom Sophie has done fund-raising and other projects. Knows from 2017, works closely with her, fund raising and other projects: Trustworthy, good counsel, understands complex issues, provides strong guidance, wholeheartedly recommends Sophie
- Sophie's resume is attached.
- I strongly recommend her and ask that the Approval Authority approve her appointment as the Finance Committee member from Precinct 18.

# Roster Comparisons 2021 and 2022

| Appointments 2020-2021                            |                      |                           |  |
|---|----------------------|---------------------------|--|
| Legend <span>Member-at-Large (1 Year Term)</span> |                      |                           |  |
| Precinct Represented                              | Resident in Precinct | Name                      | Address                                    |
| 1   | 5                    | Grant Gibian              | 107 Webster Street, Arlington, MA          |
| 2   | 2                    | Shane Blundell            | 189 Lake Street, Arlington, MA             |
| 3   | 3                    | John Ellis                | 59 Teel Street, Arlington, MA              |
| 4   | 14                   | Michaiah Healy            | 26 Howard Street, Arlington, MA            |
| 5   | 5                    | Mary Margaret Franclemont | 157 Medford St., Arlington, MA             |
| 6   | 6                    | Arif Padaria              | 26 Marion Road, Arlington, MA              |
| 7   | 7                    | Jonathan Wallach          | 11 Webster St., Arlington, MA              |
| 8   | 8                    | Charles T. Foscett        | 101 Brantwood Rd., Arlington, MA           |
| 9   | 9                    | Brian Beck                | 147 Warren St., Arlington, MA              |
| 10  | 10                   | Peter B. Howard           | 12 Woodland St., Arlington, MA             |
| 11  | 11                   | Shaileen Crawford Pokress | 51 Crosby Street, Arlington, MA            |
| 12  | 12                   | Darrel Harmer             | 18 Cedar Av., Arlington, MA                |
| 13  | 13                   | John J. Deyst, Jr.        | 26 Upland Rd. West, Arlington, MA          |
| 14  | 14                   | Alan Jones                | 1 Lehigh St., Arlington, MA                |
| 15  | 15                   | Annie LaCourt             | 48 Chatham Street, Arlington, MA           |
| 16  | 16                   | William Kellar            | 34 Linden St., Arlington, MA               |
| 17  | 17                   | Allan Tosti               | 1 Watermill Place, Unit 419, Arlington, MA |
| 18  | 15                   | George Kocur              | 6 Blueberry Hill Lane, Arlington, MA       |
| 19  | 19                   | Christine P. Deshler      | 65 Huntington Rd., Arlington, MA           |
| 20  | 20                   | Dean Carman               | 29 Kilsythe Road, Arlington, MA            |
| 21  | 21                   | David McKenna             | 77 Sunset Rd., Arlington, MA               |

Resignations  
John Deyst  
Peter Howard  
MaryMargaret Franclemont

| Proposed Roster 2021-2022   |                      |                           |  |              |      |                     |                         |                            |  |
|---|----------------------|---------------------------|--|--------------|------|---------------------|-------------------------|----------------------------|--|
| Legend <span>Member-at-Large (1 Year Term)</span><br><span>Current Member, Precinct Changed</span><br><span>New Member</span> |                      |                           |  |              |      |                     |                         |                            |  |
| Precinct Represented  | Resident in Precinct | Name                      | Address                                    | Term Expires | 2022 | Reappoint from 2021 | Reappoint from At Large | Reappoint for New Precinct |  |
| 1   | 5                    | Grant Gibian              | 107 Webster Street, Arlington, MA          | 2022 (2023)  | x    |                     | x                       |                            |  |
| 2   | 2                    | Shane Blundell            | 189 Lake Street, Arlington, MA             | 2022         | x    |                     |                         |                            |  |
| 3   | 3                    | John Ellis                | 59 Teel Street, Arlington, MA              | 2024         |      | x                   |                         |                            |  |
| 4   | 14                   | Michaiah Healy            | 26 Howard Street, Arlington, MA            | 2022 (2023)  | x    |                     | x                       |                            |  |
| 5   | 5                    | Brian Beck                | 147 Warren St., Arlington, MA              | 2023         |      |                     |                         | x                          |  |
| 6   | 6                    | Arif Padaria              | 26 Marion Road, Arlington, MA              | 2022         | x    |                     |                         |                            |  |
| 7   |                      |                           |  | 2022         | x    |                     |                         |                            |  |
| 8   | 8                    | Sophie Migliazzo          | 175 Pleasant Street, Arlington, MA         | 2022         | x    |                     |                         | x                          |  |
| 9   | 9                    | Jonathan Wallach          | 11 Webster St., Arlington, MA              | 2024         |      | x                   |                         | x                          |  |
| 10  | 10                   | Charles Foscett           | 101 Brantwood Rd., Arlington, MA           | 2023         |      |                     |                         | x                          |  |
| 11  | 11                   | Shaileen Crawford Pokress | 51 Crosby Street, Arlington, MA            | 2023         |      |                     |                         |                            |  |
| 12  | 12                   | Darrel Harmer             | 18 Cedar Av., Arlington, MA                | 2024         |      | x                   |                         |                            |  |
| 13  | 13                   | Annie LaCourt             | 48 Chatham Street, Arlington, MA           | 2022         | x    |                     |                         | x                          |  |
| 14  | 14                   | Alan Jones                | 1 Lehigh St., Arlington, MA                | 2022         | x    |                     |                         |                            |  |
| 15  | 15                   | George Kocur              | 6 Blueberry Hill Lane, Arlington, MA       | 2024         |      | x                   |                         | x                          |  |
| 16  | 16                   | William Kellar            | 34 Linden St., Arlington, MA               | 2023         |      |                     |                         |                            |  |
| 17  | 17                   | Allan Tosti               | 1 Watermill Place, Unit 419, Arlington, MA | 2024         |      | x                   |                         |                            |  |
| 18  | 18                   | Wanda Nascimento          | 256 Sylvia St. Arlington, MA               | 2022         | x    |                     |                         | x                          |  |
| 19  | 19                   | Christine P. Deshler      | 65 Huntington Rd., Arlington, MA           | 2024         |      | x                   |                         |                            |  |
| 20  | 20                   | Dean Carman               | 29 Kilsythe Road, Arlington, MA            | 2023         |      |                     |                         |                            |  |
| 21  | 21                   | David McKenna             | 77 Sunset Rd., Arlington, MA               | 2024         |      | x                   |                         |                            |  |
| Executive Secretary:<br>Tara Bradley  |                      |                           |  | Summary:     | 9    | 7                   | 2                       | 7                          |  |

- Terms are assigned to precincts, not members
- There are seven precincts with terms expiring in 2022, with two “At Large” terms of one year also expiring in 2022 (actual precinct expiration are in parentheses)
- There are six precincts to be appointed because of precinct changes
- There is one vacant precinct
- There are two new members being proposed, Wanda Nascimento and Sophie Migliazzo

# Precinct Term Expiration Schedule

| Arlington Finance Committee<br>Precint Term Reappointments         |                            |      |      |      |      |      |      |      |      |      |      |      |      |
|--|----------------------------|------|------|------|------|------|------|------|------|------|------|------|------|
| A "1" Indicates Term Expiration as of June 30 in the Calendar Year |                            |      |      |      |      |      |      |      |      |      |      |      |      |
| Prct.  | Calendar Year term Expires |      |      |      |      |      |      |      |      |      |      |      |      |
|  | 2020                       | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | 2032 |
| 1  | 1                          |      |      | 1    |      |      | 1    |      |      | 1    |      |      | 1    |
| 2  |                            |      | 1    |      |      | 1    |      |      | 1    |      |      | 1    |      |
| 3  |                            | 1    |      |      | 1    |      |      | 1    |      |      | 1    |      |      |
| 4  | 1                          |      |      | 1    |      |      | 1    |      |      | 1    |      |      | 1    |
| 5  | 1                          |      |      | 1    |      |      | 1    |      |      | 1    |      |      | 1    |
| 6  |                            |      | 1    |      |      | 1    |      |      | 1    |      |      | 1    |      |
| 7  |                            |      | 1    |      |      | 1    |      |      | 1    |      |      | 1    |      |
| 8  |                            |      | 1    |      |      | 1    |      |      | 1    |      |      | 1    |      |
| 9  |                            | 1    |      |      | 1    |      |      | 1    |      |      | 1    |      |      |
| 10   | 1                          |      |      | 1    |      |      | 1    |      |      | 1    |      |      | 1    |
| 11   | 1                          |      |      | 1    |      |      | 1    |      |      | 1    |      |      | 1    |
| 12   |                            | 1    |      |      | 1    |      |      | 1    |      |      | 1    |      |      |
| 13   |                            |      | 1    |      |      | 1    |      |      | 1    |      |      | 1    |      |
| 14   |                            |      | 1    |      |      | 1    |      |      | 1    |      |      | 1    |      |
| 15   |                            | 1    |      |      | 1    |      |      | 1    |      |      | 1    |      |      |
| 16   | 1                          |      |      | 1    |      |      | 1    |      |      | 1    |      |      | 1    |
| 17   |                            | 1    |      |      | 1    |      |      | 1    |      |      | 1    |      |      |
| 18   |                            |      | 1    |      |      | 1    |      |      | 1    |      |      | 1    |      |
| 19   |                            | 1    |      |      | 1    |      |      | 1    |      |      | 1    |      |      |
| 20   | 1                          |      |      | 1    |      |      | 1    |      |      | 1    |      |      | 1    |
| 21   |                            | 1    |      |      | 1    |      |      | 1    |      |      | 1    |      |      |
| Total  | 7                          | 7    | 7    | 7    | 7    | 7    | 7    | 7    | 7    | 7    | 7    | 7    | 7    |



# Appointments and Terms Requested

| From June 21 Expirations |                   |                             |              | For At-Large Appointments |                |                    |              | For New Members and Precinct Changes |                  |                       |      |
|--------------------------|-------------------|-----------------------------|--------------|---------------------------|----------------|--------------------|--------------|--------------------------------------|------------------|-----------------------|------|
| Precinct                 | Name              | Address                     | Term Expires | Precinct                  | Name           | Address            | Term Expires | Precinct                             | Name             | Address               |      |
| 3                        | John Ellis        | 59 Teel Street              | 2024         | 1                         | Grant Gibian   | 107 Webster Street | 2022         | 5                                    | Brian Beck       | 147 Warren St.        | 2023 |
| 12                       | Darrel Harmer     | 18 Cedar Av.                | 2024         | 4                         | Michaiah Healy | 26 Howard Street   | 2022         | 8                                    | Sophie Migliazzo | 175 Pleasant Street   | 2022 |
| 17                       | Al Tosti          | 1 Watermill Place, Unit 419 | 2024         |                           |                |                    |              | 9                                    | Jonathan Wallach | 11 Webster St.        | 2024 |
| 19                       | Christine Deshler | 65 Huntington Rd.           | 2024         |                           |                |                    |              | 10                                   | Charles Foscett  | 101 Brantwood Road    | 2023 |
| 21                       | David McKenna     | 77 Sunset Rd.               | 2024         |                           |                |                    |              | 13                                   | Annie LaCourt    | 48 Chatham Street     | 2022 |
|                          |                   |                             |              |                           |                |                    |              | 15                                   | George Kocur     | 6 Blueberry Hill Lane | 2024 |
|                          |                   |                             |              |                           |                |                    |              | 18                                   | Wanda Nascimento | 256 Sylvia St.        | 2022 |

Dear Augusta and John:

The above list includes the appointments that I am requesting the Authority to approve. The first group are current members whose terms expired in 2021 and whose new terms will expire in 2024 if reappointed. The second group are current members serving as members-at-large for one-year terms. The third group are current members whose precincts changed, whose re-appointments I am requesting; their term expirations reflect the expiration terms of their new precincts as in the Precinct Expiration Schedule in this document.

Respectfully,  
Charlie Foscett  
Finance Committee Chair

## SOPHIE MIGLIAZZO

175 Pleasant Street – Arlington, MA - 02476  
sophiemigliazzo@yahoo.com – 857-777-9356

### LEGAL EXPERIENCE

Apr. 2009 – **D'ALVERNY AVOCATS AARPI**, Paris, France  
Apr. 2014 **Associate (*Jurist*)**

International Corporate: Advised French clients on common-law jurisdiction elements to their contracts and negotiations. Advised foreign clients on French company formation, including understanding French employment law implications. Drafted, analyzed and negotiated international distribution agreements, international partnership agreements, and general terms and conditions. Transactions included:

- Drafting distribution agreement for use in South America by French luxury furniture designer
- Negotiating with international food conglomerates for their participation in a customer “reward program”
- Coordinating implementation of company’s general terms and conditions into 6 different European jurisdictions
- Advising French in-house general counsels on matters ranging from understanding English language contract terms/implications, including implications under common-law, to understanding general corporate matters relating to their US subsidiaries.

International Financing: Represented a well-known international angel investment fund in its international seed financings. Drafted, reviewed and negotiated investment documents for investments made not only in the United States and Europe, but also in the Middle East, India, and Russia. Investments ranged from \$100,000 to \$3 million.

International Estate Planning / Administration: Liaised with French tax attorneys and notaries and with clients’ US counsel to coordinate international estate planning and international probate administration. Representative matters:

- French/American family living in France, inheriting \$2 million from the US through trusts and making gifts to French-American children. Issues involved declaring inheritance for purposes of French inheritance taxes and French wealth taxes, French information filings on US trusts, US gift tax returns, and US information filings on gifts received from France.
- Canadian / American probate with 10 beneficiaries, including 3 non-profit associations involving property owned in France. Issues involved selling French real estate, closing out bank accounts, and managing French notary on behalf of the beneficiaries in order to complete French probate, including information filings with various French authorities.

Oct. 2004 – **DAVIS, MALM & D'AGOSTINE, P.C.**, Boston, Massachusetts  
Jan. 2009 **Associate**

Corporate: Drafted, analyzed, and negotiated stock/asset purchase agreements, merger agreements, proxy statements, warrant agreements, escrow agreements, distributorship/sales representative agreements, sales contracts, confidentiality agreements, operating agreements, and leases. 8-K and Forms 3 and 4 filings. Performed due diligence reviews. Prepared minutes of board meetings, consent votes and other general corporate matters. Transactions included:

- \$194 million sale of four closely-held companies involving stock sale, merger and seller financing
- \$63 million stock sale of closely-held business
- \$3 million venture capital investment
- \$82.8 million Special Purpose IPO
- \$7.9 million Public Offering
- \$40.1 million merger of public company

Commercial Lending: Represented the local branch of a national bank in lending to small businesses in a targeted industry. Drafted and negotiated promissory notes, security agreements, guaranties and all other loan documents. Loans typically ranged from \$2 million to \$10 million.

Estate Planning/Administration: Drafted wills, revocable and irrevocable estate planning trusts and amendments thereto, special needs trusts, durable powers of attorney, health care proxies, trustee resignations and appointments. Prepared gift tax returns and estate tax returns; review and analyze

QPRTS, GRATS, CRUTS, and family limited partnerships.

Spring 2004     **KROKIDAS & BLUESTEIN, P.C.**, Boston, Massachusetts  
**Legal Intern**

Fall 2003       **DAVIS, MALM & D'AGOSTINE, P.C.** , Boston, Massachusetts  
**Legal Intern**

Spring 2003     **U.S. SECURITIES AND EXCHANGE COMMISSION**, Boston, Massachusetts  
**Legal Intern, Enforcement Division - Boston, Massachusetts**

Fall 2002       **THE HONORABLE NANCY GERTNER**, Boston, Massachusetts  
**Judicial Intern, U.S. District Court (D. Mass.)**

## **EDUCATION**

2001 – 2004     **NORTHEASTERN UNIVERSITY SCHOOL OF LAW**, Boston, Massachusetts  
Juris Doctor, May 2004  
Honors: Diane Auger Scholarship; Law Designated Scholarship; Philip E. Tesorero Scholarship; T.E. Cargill Jr. Scholarship; Class Representative to the Academic & Student Life Committee.  
Research Assistant: Provided editorial assistance on "Defining Racial Profiling in a Post-September 11th World," 40 *American Journal of Criminal Law* 1195 (2003) (Summer & Winter 2002).

1997 – 1999     **THE UNIVERSITY OF TEXAS**, Austin, Texas  
Bachelor of Arts in Government, minor in Business, December 1999  
Highlights and Honors: Completed degree in 2.5 academic years; Golden Key National Honor Society; University Honors (two times); Dean's List (three times).

## **HONORS/ ACTIVITIES**

SINCE 2018     Arlington Town Meeting Member, Precinct 8 (elected)

SINCE 2015     Elementary school volunteer

SINCE 2015     Volunteer with Boston Accueil, a non-profit association of French speakers

2009-2013     Faculty member at quarterly Business Immo seminar "French Real Estate Transactions in English"

2008-2010     Faculty member at annual MCLE Seminar on Negotiating and Drafting Acquisition Agreements

March 2008     Faculty member at the "Special Needs Trusts: Planning for the Disabled and Elderly in Massachusetts" Lorman Education Services seminar

2010             Author of "Representations, Warranties, Covenants and Conditions" chapter in *Drafting and Negotiating Massachusetts Contracts* (MCLE 2010, rev. 2013)

2009 – 2012     Member of the Warwick International Legal Network

2004 – 2016     Director, Northeastern School of Law Alumni Board, chair of Co-Op committee (2008-2013)

2007, 2008 & 2010     Named a Massachusetts Super Lawyer "Rising Star"

**BAR  
ADMISSION**     Commonwealth of Massachusetts, 2004

**LANGUAGES**     Fluent in English and French

**HOBBIES**         Cooking/Baking

**Wanda Nascimento**  
(781) 883-4705, wnasc259@gmail.com

Masters in Business Administration  
Bachelor of Science, Accountancy

Suffolk University  
Bentley University

2018 – Present Bay State Community Services

Quincy, MA

**Chief Financial Officer**

- Oversee the Finance, Information Technology, and Facilities departments.
- Serve as a strategic partner as a member of the executive leadership team in the development of strategic plans. Foster high integrity and trusting relationships with the board, leadership team, regulators, and funders.
- Provide leadership in the areas of financial and cost analysis, budget reports, risk management, and financial and government reporting.
- Develop, monitor, and oversee long-term budgetary planning and cost management. Provide oversight for and manage all budgets, forecasts, cash flow projections, and internal financial plans and processes; ensure quality control measures for internal and fiscal safeguarding.
- Oversee accounting and general ledger functions, ensuring that systems are in place to ensure timely, complete, and accurate financial data and reporting.
- Recommend and develop financial policies, procedures, systems, and other requirements based on changes in applicable laws, and financial/accounting requirements.
- Direct, consolidate, and analyze program-related cost data and performance reporting to facilitate effective decision-making.
- Advise the Executive Director and other key members of the leadership team on financial planning, budgeting, cash flow, funding priorities, strategic planning, and policy matters.
- Serves as the financial liaison to the board; effectively communicating and presenting critical financial matters at board of director and committee meetings.

2010 – 2018 City on a Hill Public Charter Schools and Foundation

Boston, MA

**Chief Financial Officer & Chief Operations Officer**

- Serve on Executive, Leadership and Strategic Planning Teams.
- Manage annual audit, 990 and Form PC and end of year Department of Education reporting.
- Lead \$17+ million budget process.
- Prepare and present financial reports to the Board of Directors and Management.
- Ensure fiscal compliance with federal, state and city grants, including Title 1, Americorps, Medicare, nutrition, transportation and ERATE technology reimbursements.
- Design, oversee, and implement network-level strategies for human resources, teacher recruitment, information technology, facilities leasing, student transportation and nutrition.
- Oversee on-time opening of all new CoaH facilities in Boston and New Bedford
- Hire, mentor, supervise, and ensure quality outcomes from Operations Manager, Manager of Human Resources & Diversity and Director of Information Technology.

2001 – 2010 Multicultural AIDS Coalition, Inc.

Boston, MA

**Director of Finance & Administration**

- Manage all financial and administrative functions for public health focused organization...
- Oversee grant and contract compliance issues to various state, city and federal regulatory agencies.
- Performed system assessments and transformations for accounting and technology.
- Implemented contract compliance and sub-recipient monitoring guidelines.
- Managed relocation reducing administrative budget by 50% with no program service reductions.
- Present monthly financial reports to the Executive Director & Board of Directors.
- Strategic Planning Committee member with Executive Director and Board of Directors.
- Managed four simultaneous audits by Inspector General's Office, Federal, State, and City funders.

|             |   |            |
|-------------|---|------------|
| 1995 – 2000 | Mass Bay Transportation Authority (MBTA) & AMTRAK | Boston, MA |
|-------------|---|------------|

**Finance/Budget Director**

- Managed \$35.4M fiscal operating and capital budget process.
- Developed cost savings proposals and budget variance reports for executive management.
- Lead project team to implement a comprehensive human resource information system.
- Managed \$145M operating budget and \$400M Capital Plan for Commuter Rail Contract.
- Trained Operations Managers in transitioning from Cost Plus to a Fixed Price Contract
- Performed compliance audits of the \$1.4B High-Speed Rail construction contract to Federal Regulations and Cost Accounting Standards.

|             |                  |               |
|-------------|------------------|---------------|
| 1989 - 1995 | RAYTHEON COMPANY | Lexington, MA |
|-------------|------------------|---------------|

**Sr. Financial & Operational Analyst/Auditor**

- Performed compliance audits to Federal Regulations and Cost Accounting Standards.
- Reviewed financial and operational records and controls in inventory, procurement, contracts, bid proposals, cash, accounts receivables, payables and labor reporting.
- Analyzed cost and pricing amounts in vendor projects and proposals, including materials, equipment usage, labor hours and overhead rates to facilitate recovery of overcharges.
- Conducted investigative audits and interviews in conjunction with Ethics Program.

|             |                            |            |
|-------------|----------------------------|------------|
| 1988 - 1989 | DELOITTE & TOUCHE CPA FIRM | Boston, MA |
|-------------|----------------------------|------------|

**Financial Auditor**

- Performed audits on mutual fund clients in the investment industry. Determined market value of investment portfolios and composed financial statements.

**Address: 256 Sylvia St. Arlington, 02476 PCT 18**